

Counsel Submitting and Utah State Bar Number
Attorneys for
Address
Telephone
E-mail Address

**IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF UTAH _____ DIVISION**

VS.

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**ATTORNEYS' PLANNING
MEETING REPORT**

Case No. _____
District Judge _____

1. PRELIMINARY MATTERS:

- a. The nature of the claims and affirmative defenses is:
- b. This case is _____ not referred to a magistrate judge
_____ referred to magistrate judge _____
_____ under 636(b)(1)(A) or
_____ under 636(b)(1)(B)
_____ assigned to a magistrate judge under General Order 07-001 and
_____ all parties consent to the assignment for all proceedings or
_____ one or more parties request reassignment to a district judge.
- c. Pursuant to Fed. R.Civ.P. 26(f), a meeting was held on _____ *specify*
date at _____ *specify location*.
- The following attended:
- _____ *name of attorney,*
counsel for _____ *name of party*
_____ *name of attorney,*
counsel for _____ *name of party*
- d. The parties _____ request / _____ do not request an initial pretrial scheduling
conference with the court prior to entry of the scheduling order. An initial pretrial
scheduling conference is set before Magistrate Judge _____

on _____, 20____, at _____. m.

- e. The parties _____ have exchanged or _____ will exchange by ____/____/____ the initial disclosures required by Rule 26(a)(1).
- f. Pursuant to Fed. R. Civ. P. 5(b)(2)(D), the parties agree to receive all items required to be served under Fed.R.Civ.P. 5(a) by either (i) notice of electronic filing, or (ii) e-mail transmission. Such electronic service will constitute service and notice of entry as required by those rules. Any right to service by USPS mail is waived.

2. DISCOVERY PLAN: The parties jointly propose to the court the following discovery plan:

Use separate paragraphs or subparagraphs as necessary if the parties disagree.

- a. Discovery is necessary on the following subjects: *Briefly describe the subject areas in which discovery will be needed.*
- b. Discovery Phases.
Specify whether discovery will (i) be conducted in phases, or (ii) be limited to or focused upon particular issues. If (ii), specify those issues and whether discovery will be accelerated with regard to any of them and the date(s) on which such early discovery will be completed.
- c. Designate the discovery methods to be used and the limitations to be imposed.
 - (1) *For oral exam depositions, (i) specify the maximum number for the plaintiff(s) and the defendant(s), and (ii) indicate the maximum number of hours unless extended by agreement of the parties.*

Oral Exam Depositions

Plaintiff(s) _____

Defendant(s) _____

Maximum no. hrs. per deposition _____

- (2) *For interrogatories, requests for admissions, and requests for production of documents, specify the maximum number that will be served on any party by any other party.*

Interrogatories _____

Admissions _____

Requests for production of documents _____

- (3) Other discovery methods *Specify any other methods that will be used and any limitations to which all parties agree.*
- d. Discovery of electronically stored information should be handled as follows: *Brief description of parties' agreement.*
- e. The parties have agreed to an order regarding claims of privilege or protection as trial preparation material asserted after production, as follows: *Brief description of provisions of proposed order.*
- f. Last day to file written discovery and last day to file standard motions to compel
____/____/____
- g. Close of fact discovery ____/____/____
- h. (optional) Final date for supplementation of disclosures under Rule 26 (a)(3) and of discovery under Rule 26 (3) ____/____/____

3. AMENDMENT OF PLEADINGS AND ADDITION OF PARTIES

- a. The cutoff dates for filing a motion to amend pleadings are: *specify date*
Plaintiff(s) ____/____/____ Defendant(s) ____/____/____
 - b. The cutoff dates for filing a motion to join additional parties are: *specify date*
Plaintiff(s) ____/____/____ Defendants(s) ____/____/____
- (NOTE: Establishing cutoff dates for filing motions does not relieve counsel from the requirements of Fed.R.Civ.P. 15(a)).**

4. EXPERT REPORTS

- a. Reports from experts under Rule 26(a)(2) will be submitted on: *specify dates*
Parties bearing burden of proof ____/____/____
Response ____/____/____

5. OTHER DEADLINES

- a. Expert Discovery cutoff: ____/____/____
- b. Deadline for filing dispositive¹ or potentially dispositive motions including motions to exclude experts where expert testimony is required to prove the case. ____/____/____
- c. Deadline for filing partial or complete motions to exclude expert testimony
____/____/____

¹ Dispositive motions, if granted, affect the final resolution of the case: nondispositive motions, if granted, affect the case but do not dispose of it.

6. ADR/SETTLEMENT:

Use separate paragraphs/subparagraphs as necessary if the parties disagree.

- a. The potential for resolution before trial is: _____ good _____ fair _____ poor
- b. This case should be referred to the court's alternative dispute resolution program for arbitration: _____ mediation: _____
- c. The parties intend to engage in private alternative dispute resolution for arbitration _____ mediation _____
- d. The parties will re-evaluate the case for settlement/ADR resolution on:
specify date ____/____/____

7. TRIAL AND PREPARATION FOR TRIAL:

- a. The parties should have _____ days after service of final lists of witnesses and exhibits to list objections under Rule 26(a)(3) (if different than 14 days provided by Rule).
- b. This case should be ready for trial by: *specify date* ____/____/____
Specify type of trial: Jury _____ Bench _____
- c. The estimated length of the trial is: *specify days* _____

Signature and typed name of Plaintiff(s) Attorney

Date: ____/____/____

Signature and typed name of Defendant(s) Attorney

Date: ____/____/____

NOTICE TO COUNSEL

The Report of the Attorney Planning Meeting should be completed and filed with the Clerk of the Court twenty-one days before the date of the Initial Pretrial Conference. A copy of the Proposed Scheduling Order on the court's official form should be submitted in word processing format by email to ipt@utd.uscourts.gov. If counsel meet, confer, and

- (i) file a stipulated Attorney Planning Meeting Report and
 - (ii) email a draft scheduling order in word processing format by email to ipt@utd.uscourts.gov
- twenty-one days before the scheduled hearing, the Court will consider entering the Scheduling Order based on the filed Attorney Planning Meeting Report.

If the Hearing is held, counsel should bring a copy of the Attorney Planning Meeting Report to the Hearing.

In CM/ECF, this document should be docketed as
Other Documents - Attorney Planning Meeting.

More information is available at

<http://www.utd.uscourts.gov/documents/ipt.html>



The image shows a screenshot of a web form titled "CM/ECF" in a blue header. To the right of the header, the text "Civil • Cri" is visible. Below the header, the section is titled "Other Documents" in blue. There is a dropdown menu with the text "Attorney Planning Meeting" and a downward arrow. Below the dropdown are two buttons: "Next" and "Clear".